Agency Instruction Manual

for

A service of:

Revised November 15, 2013

TABLE OF CONTENTS

NOTE: Control Click on the page number will take you directly to that portion
        of this manual.

ACTIVATING YOUR PERSONAL LOGIN FOR AGENCY ACCESS

As we transition from Volunteer Connection to Voly, the Primary Contact and Volunteer Coordinator at each VCNT member agency will receive an email from Voly inviting them to activate their account.

Please click on the link in that email message to begin your new Voly adventure.

Hi, VCNT has invited you to use Voly!

With Voly you can promote, manage, and track your agency's volunteer activity. Simply click the link below to get started with using your Voly account!

Click Here To Activate Your Account
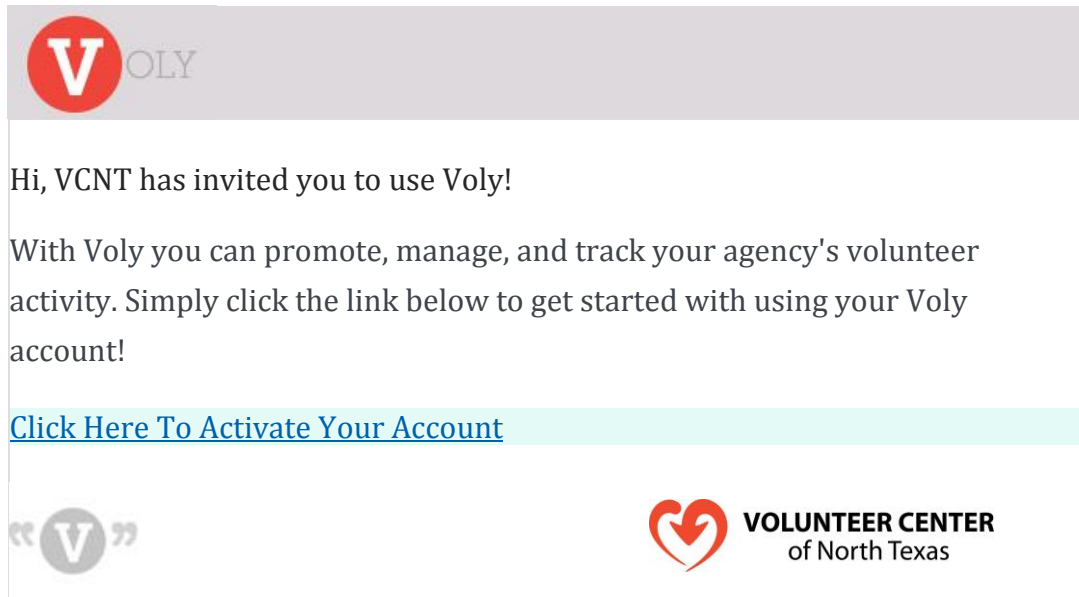
Welcome, you have been invited to join (Agency Name)

You're almost there, but we need a few things in order to set up your account. Please fill in the form below to activate and access your new Voly.org account.

Your Name

Password   Confirm Password

Finish Setup!

Click Finish Setup and you will be taken to your agency's Voly Dashboard with the following header message:

Your account is now set up successfully and you can start using Voly.org

ACCESS VOLY
1. Go to http:voly.org

LOGIN TO YOUR AGENCY ACCOUNT

1. Click on the My Account Section in the navigation and select 'Nonprofits'
2. Enter your email address and your private password.
3. Click Log In

COMPLETE YOUR AGENCY PROFILE

1. There are a few areas you must review and complete to activate your organization's profile. As soon as your organization's profile is activated you can begin to post volunteer opportunities.
   - Impact Statement: A brief statement of the impact your organization makes in this world
   - Upload a profile logo or photo
   - Select a single Primary Cause

2. Once you complete these updates, your agency dashboard will appear. From here, you can complete your organization's profile and manage several areas of VOLY.
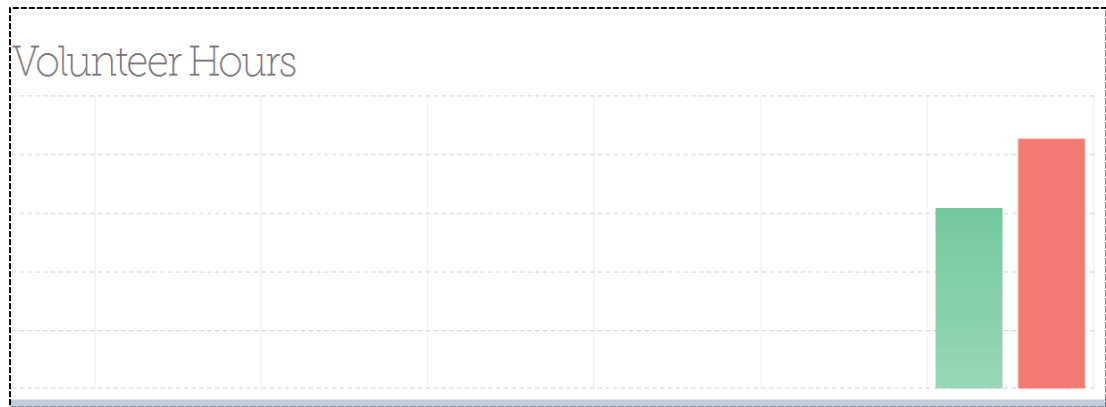
YOUR AGENCY DASHBOARD

Your agency dashboard provides helpful information for you to manage your agency and stay informed about what's happening with your volunteers.

1.   2.   3.   4.   5.
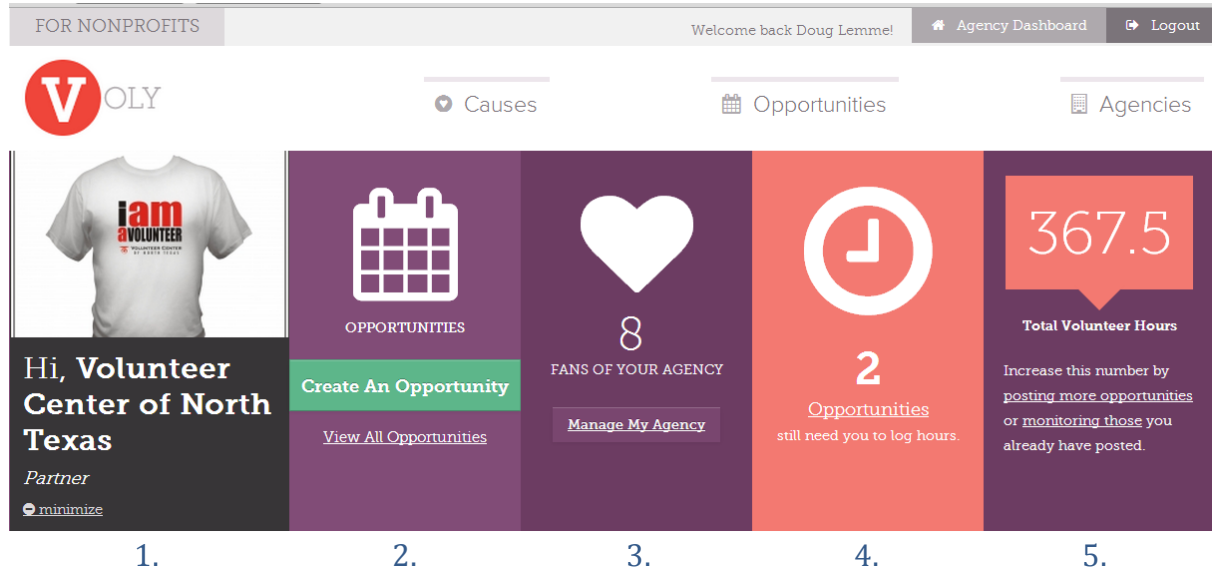
1. Here you will see the logo or photo you have uploaded for your public profile
    a. Your agency Name
    b. Your current membership level with VCNT
    c. Click *minimize* to shrink the dashboard to a narrow navigation bar
2. Opportunities allows you to manage your volunteer opportunity postings
    a. Create a new opportunity
    b. View all opportunities provides a list of all active, past and draft opportunities
3. Beneath the heart you will see the number of Voly members who have become fans of your agency.
    a. Fans are people who care about your agency and want to follow your activity.
    b. Manage my agency allows you to share information that can help us match group and individual volunteers to your specific needs. This is also where you identify agency contact and manage your account.
4. The clock icon provides a reminder of past opportunities, so you can report hours into Voly's tracking system for your volunteer and your agency records.
5. The call out provides a quick glance of the total number of volunteer hours you have reported through Voly along with tips on how to increase you volunteer hours.

Volunteer Hours

6. The middle section of your agency dashboard is a month by month bar graph of volunteer hours. It looks blank right now, however once you have used Voly for a few months, you will find this provides a helpful glance at how volunteer hours are trending for your organization.


Upcoming Opportunities

Busy Work
Every Day

2
VOLUNTEERS STILL NEEDED

See All 18 Volunteers

Meet and Greet Great Dallasites!
Every Mon, Tue, Thu, Fri

0
VOLUNTEERS STILL NEEDED

See All 6 Volunteers

7. The third section of your dashboard gives you a quick glance of your next three volunteer opportunities.
   a. The photo you have uploaded for this opportunity
   b. The name of the opportunity
   c. When this opportunity is scheduled
   d. How many volunteers you still need
   e. If there are interested volunteers who are awaiting your review and approval
   f. How many volunteers have been approved for this opportunity with a link to manage those volunteers

NOTE: Voly will send approved volunteers email reminders 1 week and 1 day prior to your event to encourage their participation.

MANAGE YOUR AGENCY DETAILS

1. Click on the Manage My Agency section in the dashboard
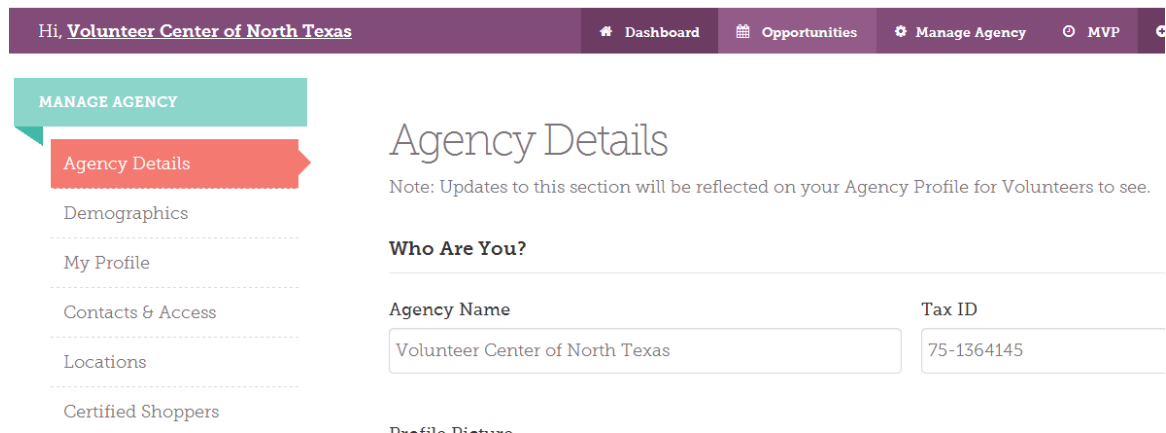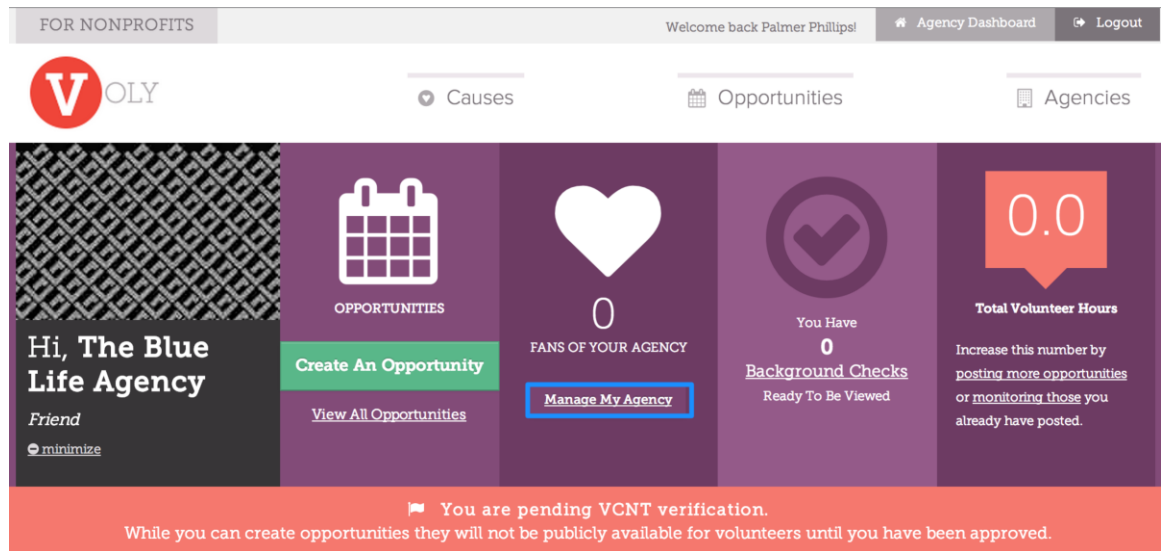
2. From here, you can manage:
   - Agency Details
     NOTE: *The 'Mission Statement' is intended to be a statement of purpose or short "elevator speech' to inform potential volunteers about your agency and clientele.*
     - Who you are
     - Who you serve
     - Optional Links for your website, facebook, twitter and on-line donations
   - Demographics:
     NOTE: This data helps us find your agency when corporations or groups are seeking to serve specific causes and domographics.

- o Budget & classification
- o Ethnicities served
- o Client and volunteer details
- My Profile
  - o Change your personal password
  - o Manage the frequency of emails you receive from Voly
- Contacts and Access
  - o Identifies which staff members have access to Voly and other VCNT services, including disaster management
  - o Establishs and stores agency project leader contact information
  - o Allows you to ensure that the right staff members receive information from VCNT on relevant programs
- Locations
  - o Allows you to preset the addresses where volunteers are most often needed
- Certified Shoppers
  - o This is where you manage your Donated Goods shoppers

MANAGING YOUR AGENCY CONTACTS

Agency contacts you designate will each be able to create their own login and password to access your agency's profile on Voly. In Voly, these contacts can create volunteer opportunities, manage volunteers, report MVP hours, and track your overall progress as an agency. You may also designate specific Agency Users to be listed on MVP timecards and request or review veriFYI criminal background checks.

1. Click on the Manage My Agency section in the dashboard
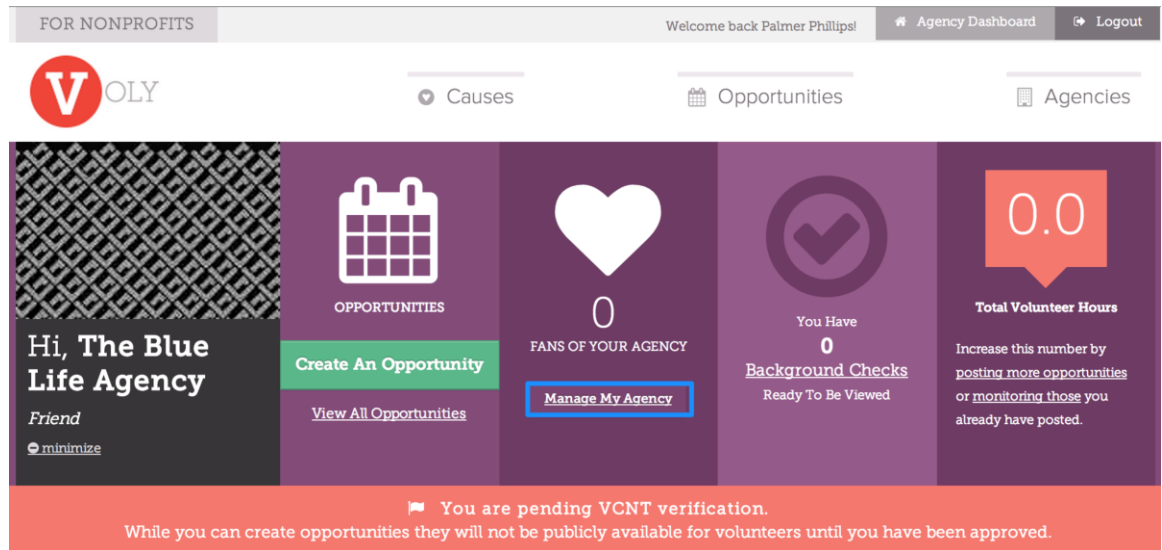
2. Click on "Contacts & Access" in the dropdown list
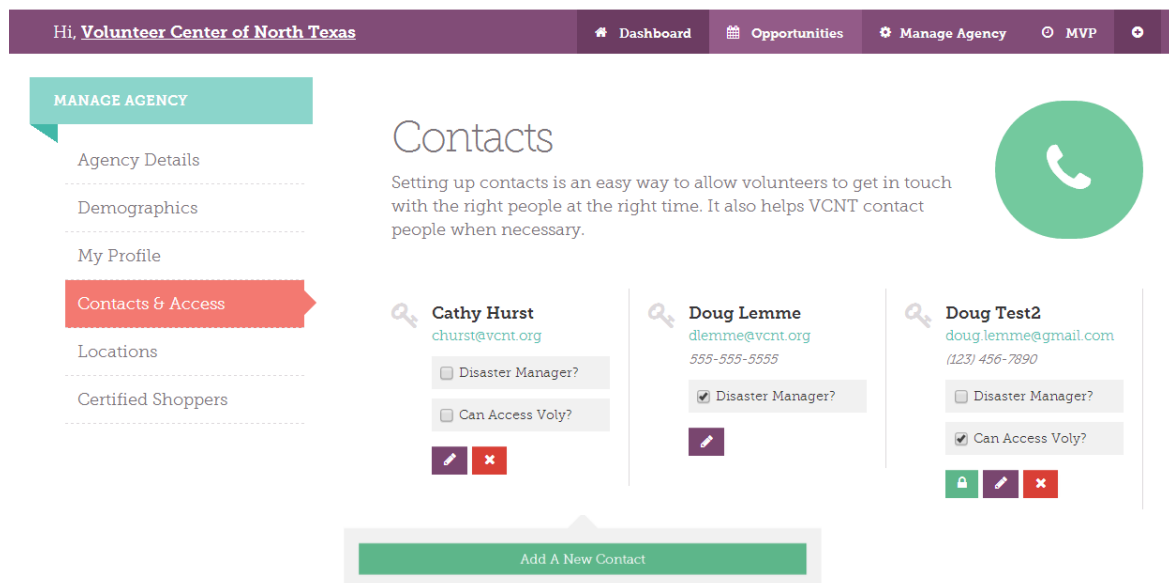
3. Review the list of contacts imported from Volunteer Connection and make necessary edits.
   - Please delete contact that are no longer with your agency
   - Identify which contacts need personal login access to Voly
   - Indicate any contacts that are per-certified as Disaster Managers for the Mass Care Task Force.

4. To add a new contact
   - Click Add A New Contact
   - Enter the name, email address and phone number of the new contact
   - Indicate which programs/services they should be contacted about
   - If you want them to have access to Voly, click the box at the bottom of the form (It will change from red to green)
   - Click on Save Contact
   - NOTE: If you provided access to Voly, they will immediately receive an email inviting them to create their own password

Add Contact
Use the form below to add a new contact.

Name

Email Address

Phone

☐ VeriFYI
☐ Volunteer Coordinator
☐ Primary Contact
☐ Agency
☐ Donated Goods
☐ Development
☐ Billing
☐ Project Manager
☐ Other
☐ ED/CEO

❌ **Give Access To Voly!**
Allow this contact to login to Voly for your agency.

Save Contact or cancel

5. Each Voly User will need to follow the link in their emailed invitation, to create their password and activate their access your agency profile on Voly.

ACTIVATE A DRAFT OPPORTUNITY

All of your agency volunteer opportunities from Volunteer Connection have been imported into Voly as draft opportunities.   To activate a draft opportunity you must edit the opportunity and complete the new Voly fields.

1.   Log into your nonprofit account on Voly.org.

2.   Click "View All Opportunities" in the Dashboard.
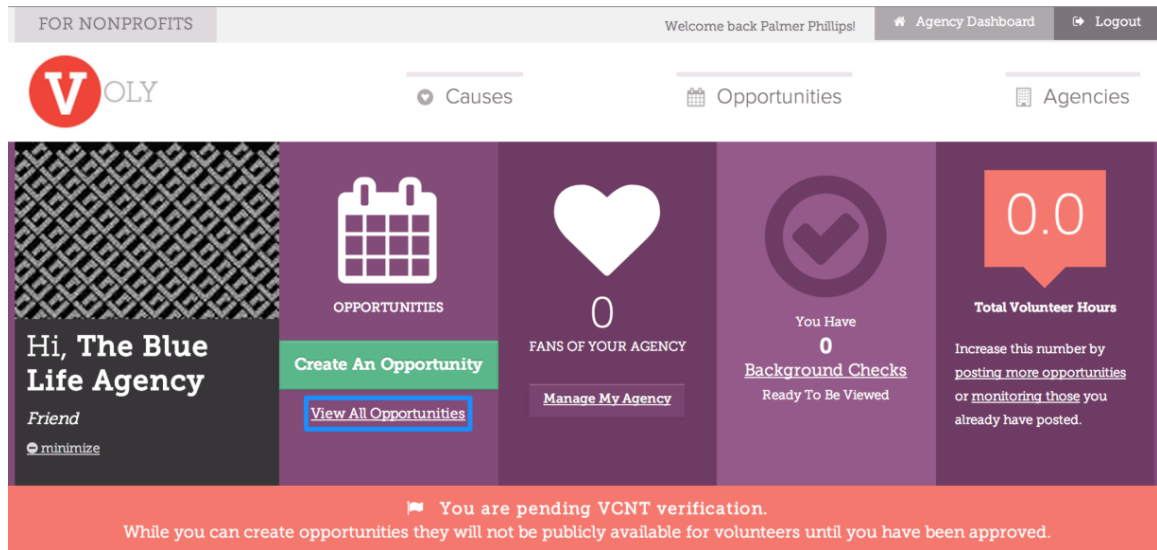
3.   Find the opportunity you want to edit and click on the edit icon to the right of that opportunity.
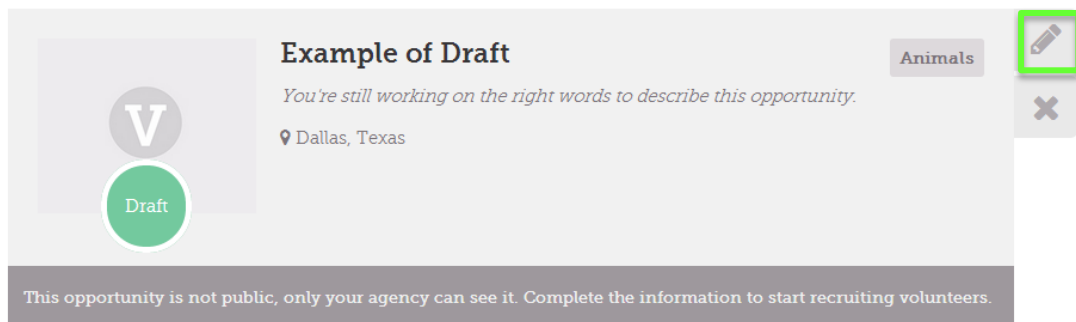
4. Review each Step of the volunteer opportunity to complete missing information and to edit and update existing information to provide an accurate, attractive and compelling posting for perspective volunteers.

STEP 1   Name & Contact

Edit your opportunity name and Project Leader, as needed. You can create a new contact here, if needed.

STEP 2   Date & Location

- When do you need your volunteers?
    - Because Voly manages dates differently than Volunteer Connection, you will need to enter new start date information for imported opportunities.
    - Use the + and – to increase or decrease the hours for this opportunity
    - Please indicate if the opportunity repeats
    - If this opportunity is not date sepcific, click on 'any day'
- How will hours be assigned?
    - Auto assign, means once you check in volunteers they will all automatically receive the preset number of hours for the event
    - Check in and Out, allows you to easily manage the number of hours worked for each volunteer
- Where will they go to volunteer?
    - Chick on a preset location for this volunteer opportunity or
    - Create a new location
- Click Save and Continue

STEP 3   Cause & Description

What cause will this opportunity effect?

Please select the Primary Cause for this opportunity from our new list of options. This does not need to be identical to the Primary Cause for your agency.

Project Briefing

This short introduction is the first thing volunteer will see about your opportunity. Use this to grab their attention and help them see if they are a good fit for this opportunity.

Full Description

This description will be downloaded from Volunteer Connection. Please review to be sure it is still accurate and complete. You have plenty of room to include how this work will impact your clients and your cause. Also include any volunteer requirements or restrictions, and the time of day you will need volunteers.

Opportunity Picture

You can upload your logo or a photo to attract volunteers to this opportunity

Save and Continue

STEP 4   Volunteers

Determine how many volunteers you will need, which type of volunteers (general vs. specific skills) and whether you prefer individuals or groups.

How many volunteers do you need?

5   +   −

What type of volunteers are you looking for?

General Volunteers
We can use any volunteer that is willing to help out our cause.

Specific Skills
We need volunteers who have specific skills to meet our needs.

Who is this opportunity appropriate for?

Please select the individuals and /or groups that are the best fit for this opportunity.

As soon as you complete the required information and click Publish Opportunity this opportunity will be visible to community volunteers in Voly. It also will appear in searches related to cause, or key words listed in your opportunity title or description.

CREATE A NEW OPPORTUNITY

1. Click "Create an Opportunity" from your agency dashboard
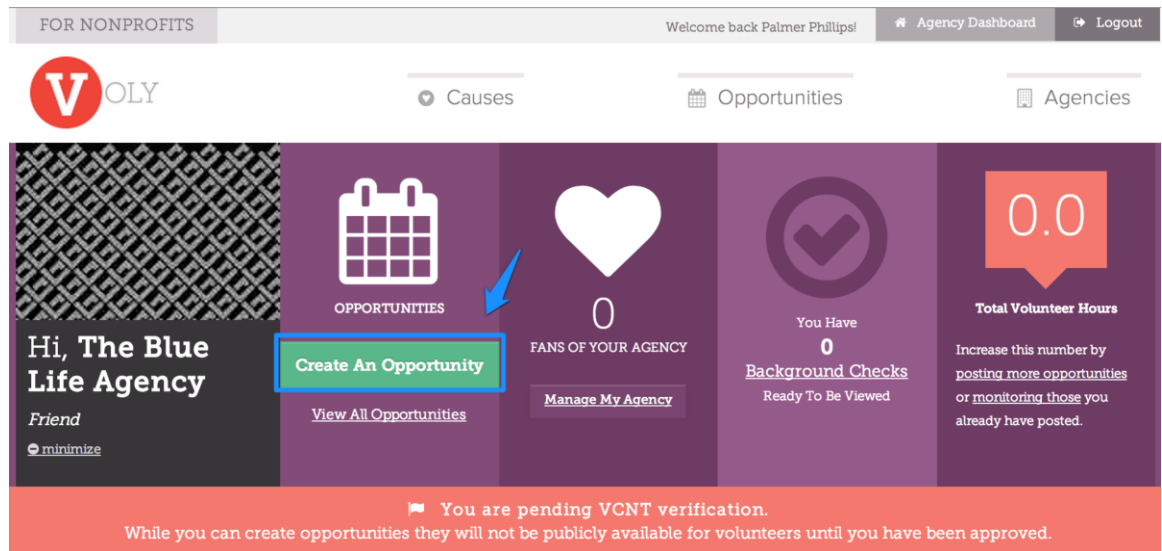
2. Name your opportunity and assign a Project Leader. You can create a new contact here, if needed.

3. Date and Location
   - When do you need your volunteers?
     - Because Voly manages dates differently than Volunteer Connection, you will need to enter new start date information for imported opportunities.
     - Use the + and – to increase or decrease the hours for this opportunity
     - Please indicate if the opportunity repeats
     - If this opportunity is not date sepcific, click on 'any day'
   - How will hours be assigned?
     - Auto assign, means once you check in volunteers they will all automatically receive the preset number of hours for the event
     - Check in and Out, allows you to easily manage the number of hours worked for each volunteer
   - Where will they go to volunteer?
     - Chick on a preset location for this volunteer opportunity or
     - Create a new location
   - Click Save and Continue

When do you need your volunteers?

| 📅 | | for | 5 | + | − | hours |

☐ Our opportunity repeats?   ⊙ We will accept volunteers any day!

How will your hours be assigned?

Auto Assign Hours
Hours will automatically be assigned to volunteers that attend.

Check In & Out
You will need to verify each volunteer's hours individually.

Where will they go to volunteer?

📍 **123 Main Street**
Dallas, TX 75228

or you can
📍 Create A New Location

Save & Continue

4. Cause & Description

What cause will this opportunity effect?

Please select the Primary Cause for this opportunity from our new list of options. This does not need to be identical to the Primary Cause for your agency.

Project Briefing

This short introduction is the first thing volunteer will see about your opportunity. Use this to grab their attention and help them see if they are a good fit for this opportunity.

Full Description

This description will be downloaded from Volunteer Connection. Please review to be sure it is still accurate and complete. You have plenty of room to include how this work will impact your clients and your cause. Also include any volunteer requirements or restrictions, and the time of day you will need volunteers.

Opportunity Picture

You can upload your logo or a photo to attract volunteers to this opportunity

5. Volunteers

   Determine how many volunteers you will need, which type of volunteers (general vs. specific skills)

   Please select the individuals and /or groups that are the best fit for this opportunity.

   As soon as you complete the required information and click Publish Opportunity this opportunity will be visible to community volunteers in Voly. It also will appear in searches related to cause, or key words listed in your opportunity title or description.

WHEN A VOLUNTEER EXPRESSES INTEREST IN YOUR OPPORTUNITY

1. Voly will send an email with the volunteer's name and email address to the opportunity contact and to the person who posted the opportunity.
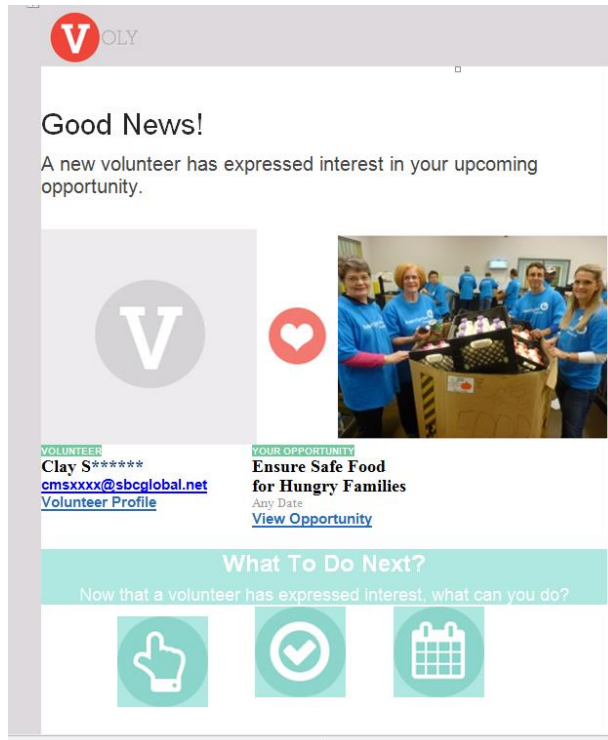
Please note: To receive these emails the Opportunity Contact must have activated their Voly account by confirming their email address and establishing a password.

2. Voly will generate an email to the volunteer with the name, address, and phone number of the opportunity contact.
3. The agency follows up with the volunteer
    o We recommend an immediate email to interested volunteers thanking them for their interest and detailing next steps in the process.
    o You can view the volunteer's profile in Voly to learn more about them, their areas of interest and prior volunteer experience.
    o You can request additional information from the volunteers, such as completing a volunteer application for your agency, or doing a criminal background check, if needed.
    o You can set-up an interview with the volunteer, or invite them to an agency orientation meeting
4. When you have sufficient information to make a decision about the volunteer follow the steps in the next section to Manage Interested Volunteers

MANAGE INTERESTED VOLUNTEERS

1. Click "View All Opportunities" in the Dashboard.

2. Click "Manage Volunteers" (hand icon) on the opportunity which requires attention.

Manage Volunteers

Volunteer	Status	Actions
Brian Thoreson *bthoreson@msn.com* 📍 Dallas, TX	⚠️ Interested In Volunteering	✅ ❌
Carolyn Labarba *clabarba2000@yahoo.com* 📍 Garland, TX	⚠️ Interested In Volunteering	✅ ❌

- o Click on the green check mark to Approve the volunteer.
  - Volunteer's status will change to Accepted to Volunteer
  - Voly will immediately send an acceptance email
  - Voly will send a reminder emails 7 days prior to the event.
  - Voly will send another reminder email 1 day prior to the event.
  - Approved volunteers will be added to the roster for the volunteer event

- o Click on the red X to Decline the Volunteer
  - Volunteer's status will change to Declined
  - Voly will immediately send a "Sorry, you are not needed" email

- NOTE: Until you Accept or Decline the volunteer, Voly will indicate they 'need attention.'

- NOTE #2: If you are using veriFYI for you background checking, we will be adding a way to request and track that through Voly later this year.

AFTER THE OPPORTUNITY

1. Voly will send an email to the opportunity contact and to the person who posted the opportunity reminding you to report hours for your volunteers.

TRACK VOLUNTEER HOURS

1. Click "View All Opportunities" in the Dashboard.

2. Click 'Track Hours' (clock icon) on the opportunity which requires attention.

3. On this page, you can:
   - View approved hours
   - Manually approve hours

Track Hours   1/**5** Found

◯ This opportunity is registered as Auto Assign Hours. Hours will automatically be assigned to volunteers that attend.

Volunteer	Hours
✓ Ⓥ Palmer Phillips *palmer@lifeblue.com*	*This volunteer did not attend. Click on the "red x" icon to the left to change this volunteer's attendance record.*
Manually approve here	

Save Hours

3. Click on the Check Mark to indicate the volunteer did report for this volunteer opportunity.
   o If you selected 'Auto Assign Hours' for this opportunity for this opportunity the volunteer will receive a pre-set number of hours.
   o If you selected 'Check In and Out' for this opportunity you can easily adjust the number of hours actually worked for this volunteer based upon sign in and out sheets. Simply toggle the up and down arrows next to the hours for this volunteer

4. Click on Save Hours to credit each volunteer and your agency with the hours worked for this opportunity. Hours you report will be visible on both your agency profile and on the volunteer's profile page.

5. For ongoing opportunities, you can add additional hours for any of your volunteers each time they volunteer by adding the new hours to those already reported.

6. NOTE: For Ongoing Opportunities
   o We are still working on improving the way Voly handles on-going opportunities, so this may change in the future. Here is how it works now.
      ▪ You posted an opportunity that reoccurs every day
      ▪ One or more volunteers expressed interest in this opportunity
      ▪ It is past your start date, so Voly wants to remind you to report hours any volunteers who may have worked on that day.
      ▪ If a volunteer has not worked, you have nothing to report, and you can ignore this message.

MANAGE DONATED GOODS SHOPPERS

1. Click on the Manage My Agency section in the dashboard

2. Click on 'Certified Shoppers' under Manage Agency

3. Review shopper list and add, edit, or delete, as needed.
   - Agency must have a Partner or Associate membership with VCNT to be eligible to designate shoppers
   - Certified shoppers must be paid staff of your agency
   - No volunteers, friends or family members may be listed as shoppers
   - Shoppers may not bring children or guests with them to shop
   - DG items may not be resold
   - Falsification of records or violation of DG policies may result in loss of shopping privileges for the individual or the agency.

4. To add a new shopper
   - Click on the link
   - Complete required information
   - Click to Save Shopper

Add Shopper
Use the form below to add a new shopper.

Name

Email Address

Position

Save Shopper   or cancel

Report MVP Hours

1. Log into your agency account on Voly

2. Click on the Manage My Agency section in the dashboard

3. Click on MVP on the purple bar near the top of the page

4. Type in Current Month Hours for each MVP volunteer who work at your agency this month

Register MVP hours

Please use the form below to add hours to your MVP Volunteers

Client Name	Date of Birth	Current Month Hours
xxxxxxxxxx	06/11/1982	
Doe, John	01/01/1950	

5. Click Submit MVP Hours